



Filing ID #10020622

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Bob Corlew  
**Status:** Congressional Candidate  
**State/District:** TN06

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 05/3/2018  
**Period Covered:** 01/01/2017– 04/16/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AbbVie Inc. (ABBV) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
AF Capital Income Builder [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Alerian MLP ETF (AMLP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Alphabet Inc. - Class A (GOOGL) [ST]		\$1,001 - \$15,000	None		
American Balanced Funds [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
American Express Company (AXP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
American Tower Corporation (AMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of America checking account [BA]	JT	\$15,001 - \$50,000	None		
Bank of America Corporation (BAC) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Bank of American savings account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Blackrock Advantage Global [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Blackrock Equity Dividend [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Blackrock Global Allocation [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Blackrock Multi Asset Income [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Blackrock Strategic Global [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Campaign loan [DO]		\$500,001 - \$1,000,000	Interest	None	None
Cisco Systems, Inc. (CSCO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Coca-Cola Company (KO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Columbia Cap Alloc Moderate [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Columbia Global Equity Value [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Credit Suiss AG London Note Zero Cpn [CS]		\$100,001 - \$250,000	None		
DESCRIPTION: bond not called or redeemed					
Deere & Company (DE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Dell Technologies Inc. Class V (DVMT) [ST]		None	Capital Gains	\$201 - \$1,000	None
DFA Emerging Markets [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
DFA Emerging Markets Portfolio [MF]		\$1,001 - \$15,000	Capital Gains,	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
			Dividends		
DFA Emerging Markets Small Cap [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
DFA Intl Small Cap Value [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
DFA Intl Small Co Portfolio [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
DFA Intl Value [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
DFA Real Est Securities [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
DFA US Core Equity 2 [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
DFA US Large Cap Value [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
DFA US Vector Equity [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Duke Energy Corporation (DUK) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Edward D Jones MM fund [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		
Exxon Mobil Corporation (XOM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Exxon Mobil Corporation (XOM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
First Bank savings account [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$201 - \$1,000
General Electric Co NT [CS]		None	Interest	None	\$201 - \$1,000
DESCRIPTION: bond redeemed in Dec 2017					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Goldman Sachs Senior Bond 2.6 [CS] DESCRIPTION: bond not called or redeemed		\$15,001 - \$50,000	Interest	\$1 - \$200	\$201 - \$1,000
HCA Healthcare, Inc. (HCA) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
House and farm land [RP] LOCATION: Milton/Rutherford, TN, US		\$500,001 - \$1,000,000	None		
HSBC USA Bumps LKD SPX Zero Cpn [CS] DESCRIPTION: not called or redeemed		\$100,001 - \$250,000	None		
HSBC USA Diginal Note Zero Cpn [CS] DESCRIPTION: bond not called or redeemed		\$100,001 - \$250,000	None		
Income FD of America [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Intel Corporation (INTC) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
International Business Machines Corporation (IBM) [ST]		None	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Invesco American Franchise fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Invesco Charter Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ Fidelity Contrafund [MF]		\$100,001 - \$250,000	Tax-Deferred		
IRAs ⇒ Fidelity OTC Portfolio [MF]		\$250,001 - \$500,000	Tax-Deferred		
IRAs ⇒ Fidelity Puritan Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		
IRAs ⇒ Invesco Comstock Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRAs ⇒ Invesco Equally Weighted S&P 500 [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRAs ⇒ Invesco Equity and Income Fd [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ Invesco Growth & Income [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRAs ⇒ Invesco Intl Growth Fd [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ Morgan Stanley Private Bank [IH]		\$50,001 - \$100,000	Tax-Deferred		
Johnson & Johnson (JNJ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
JP Morgan Chase Bond [CS] DESCRIPTION: not called or redeemed		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Kestra investments-Bank depo sweep acct [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Kroger Callable 2.8% [CS] DESCRIPTION: bond not called or redeemed		\$15,001 - \$50,000	Interest	\$1 - \$200	\$201 - \$1,000
Land- Molloy Ln 3 acres [RP] LOCATION: Murfreesboro/Rutherford, TN, US		\$100,001 - \$250,000	None		
Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
New York Life ins policy [WU]		\$1,001 - \$15,000	None		
Pinnacle Cash Sweep [BA]		\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Prudential Financial, Inc. (PRU) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Quanta Services, Inc. (PWR) [ST]		None	Capital Gains	\$201 - \$1,000	None
Rental properties ⇒ House- Apollo Dr [RP]		\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Murfreesboro/Rutherford, TN, US					
Rental properties ⇒ House-Riverbend [RP]		\$250,001 - \$500,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
LOCATION: Murfreesboro/Rutherford, TN, US					
Schlumberger N.V. (SLB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Seagate Technology PLC - Ordinary Shares (STX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
State Farm Life Ins policy [WU]		\$1,001 - \$15,000	None		
SunTrust Banks, Inc. (STI) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Suntrust BKS Senior Bond [CS]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$201 - \$1,000
DESCRIPTION: not called or redeemed					
Tenn Consolidated Retire Sys- pension benefit [DB]		Undetermined	pension	\$15,001 - \$50,000	\$50,001 - \$100,000
Thomson Reuters-West Publishing [IP]		Undetermined	Royalty	\$201 - \$1,000	\$1,001 - \$2,500
Union Pacific Corporation (UNP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
United Technologies Corporation (UTX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
UnitedHealth Group Callable 3.375 [CS]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$201 - \$1,000
DESCRIPTION: not called or redeemed					
Walt Disney Company (DIS) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Tenn Cons Retirement System	State Tennessee pension benefit	\$36,000.00	\$91,094.00

Source	Type	Amount Current Year to Filing	Amount Preceding Year
International Assoc of Lions Clubs	President of Association		\$4,650.00
Lions Club International Foundation	Expense reimbursement	\$2,000.00	N/A

**SCHEDULE D: LIABILITIES**

None disclosed.

**SCHEDULE E: POSITIONS**

Position	Name of Organization
President	International Association of Lions Clubs
Trustee	Tennessee Lions Charities
Chairman	Lions Clubs International Foundation

**SCHEDULE F: AGREEMENTS**

Date	Parties To	Terms of Agreement
September 2014	myself and State of Tennessee	pension benefit

**SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

None disclosed.

**SCHEDULE A ASSET CLASS DETAILS**

<ul style="list-style-type: none"><li>IRAs</li><li>Rental properties LOCATION: US</li></ul>
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**EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

**CERTIFICATION AND SIGNATURE**

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Bob Corlew , 05/3/2018